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Turkey

Exporter Guide

Annual

2004

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Report Highlights:
Recent changes to Turkey's Food Law, and other changes intended to harmonize food and agricultural laws with those in the EU present challenges and opportunities for exporters in this market. Economic growth in Turkey is also creating opportunities for U.S. food and agricultural exports. Opportunities for high-value products, however, remain limited by domestic and regional competition, as well as arduous import requirements.

Includes PSD Changes: No
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Ankara [TU1]
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SECTION I. Market Overview

I.1. Economic Situation

Economic growth has definitely returned to Turkey. After suffering a financial crisis and recession in 2001, the economy grew by 7.8% in 2002, nearly 6% in 2003 and 12 % in the first quarter of 2004. Initially, growth was driven predominantly by export-led production. Currently, there are also indications of an increase in domestic demand. Unemployment, however, remains high at over 10 percent. Nonetheless, economic growth it is driving growth in some food and agricultural sub-sectors such as fast food, catering, and yarn and textile production.

Turkey's economy – as its culture - is a blend of both the modern and traditional. Turkey has a vibrant private sector although the government still plays a major role in many areas including transportation, communication and agriculture. Agriculture accounts for approximately 12 percent of GNP while up to 40 percent of the population is engaged in agriculture activities. The industrial and service sectors account for 24 and 64 percent of GNP respectively, at current prices. The food and beverage sector accounts for over 10 percent of the manufacturing industry. The textile and apparel industry continues to be one of Turkey's most important sectors. Turkey's food processing sector is well developed, although it suffers somewhat from high input prices due to policies that raise some commodity prices well above the world price. These industries also enjoy significant tariff and non-tariff protection from import competition.

The EU is Turkey's main market accounting for about 50 percent of all exports. In 2003, Turkey exported USD 47 billion worth of goods, mainly consumer and semi-manufactured products. Turkey exported about USD 3.8 billion in agricultural products in 2002 with about 45 percent going to the European Union. Turkey's main agricultural exports are fresh fruits, vegetables, tree nuts (mainly hazelnuts and pistachios), dried fruits (mainly raisins, apricots and figs), cereal products (mainly wheat flour and pasta), olive oil, tobacco and tomato paste.

In 2002, Turkey imported about USD 3.4 billion in agricultural products, up over 20 percent from 2001. 2003 figures, while currently unavailable, are expected to reflect another increase. The United States is the largest single exporter of agricultural products to Turkey with a market share of over 20 percent. One-third of all U.S. exports to Turkey are agricultural products. Turkey's main agricultural imports include cotton, soybeans, soybean meal, vegetable oils, tobacco, corn, tallow, and rice. In 2003, U.S. food and agricultural exports to Turkey reached a record of over USD 900 million, after falling below USD 600 million due to the economic crisis in 2001. In 2004 U.S. exports are at a pace to break that record as well.

U.S. agriculture exports have benefited significantly from Turkey's return to economic growth. The United States supplies predominantly bulk commodities, which are key inputs to many of Turkey's important industries.

I.2. Demographic Developments

Turkey has a population of about 71 million with an annual growth rate of 1.48 percent. Fifty percent of Turkey's population is under the age 25. Over the past 30 years, Turkey's population has shifted to urban areas, however 40 percent of all Turks still live in rural settings. Unemployment continues to be a serious problem, running over 10 percent. Women constitute a significant and increasing share of the workforce which is also driving trends towards convenience foods.

I.3. Consumer Buying Habits

Turkey has a food market approaching 25 billion and its retail food sector continues to grow and modernize. However, only a small segment of the population can afford to shop in modern retail outlets. Although some supermarkets and hypermarkets exist in large cities such as Istanbul, Izmir and Ankara, the majority of Turks continue to buy food products from small, specialized neighborhood outlets. The vast majority of products available are produced locally using local ingredients, and while Turkish consumers spend close to 50 percent of their income on food, much of it is non-processed.

I.4. The market for U.S. products

Historically, export opportunities have been better for U.S. bulk commodities such as soybeans, soybean meal, vegetable oils, corn and cotton than for high-valued products. High tariffs, non-tariff barriers and competition from domestic industries and Europe has limited U.S. access to this market U.S. processed food exports to Turkey include condiments and Tex-Mex products.

The following is a summary of the advantages and challenges facing U.S. exporters in Turkey.

Advantages	Challenges
Change in retailing structure has opened new areas for branded import items.	It is hard to compete with locally produced items. The Customs Union with the EU created an advantage for EU imports to Turkey.
Some U.S. products (mainly bulk and intermediate commodities) are better priced than local products.	There is significant tariff and non-tariff protection for locally produced foods and agricultural products.
U.S. products have a good image in Turkey and Turkish consumers welcome U.S. tastes.	There are high import duties on particular products. (Between 12% to 240% on bulk agricultural commodity products and 6% to 140% on processed food products)
International retailers who market a wide range of imported products in the sector have great influence on purchasing patterns.	There is a well-developed local food-processing sector supplying most product segments in the marketplace.
There is a growing demand for specialized products such as diabetic and diet foods, ready-to-eat foods and frozen food, which are mostly imported.	US food products are weakly promoted in Turkey. Competition for shelf space has led to high costs for introducing new products.

SECTION II: Exporter Business Tips

II.1. Local Business Customs/Practices

A visitor to Turkey can see the ‘modern’, the ‘ancient’ and the ‘traditional’ all wrapped into one as East literally meets West. Business practices in Turkey can be considered very

'Western' or 'European' on the surface, but important cultural complexities exist. For those who plan on working in, or supplying to this market, it is advisable to read up on modern Turkish culture and business practices.

Personal contact is still very important for most if not all business transactions. In addition to building trust in relationships, establishing a personal relationship with the importer can assist the exporter in meeting the sometimes-daunting documentation requirements. Many importers and distributors prefer direct contacts with suppliers and exporters as there is a feeling that agents and middlemen complicate transactions, lower profits and provide more competition by selling to others.

In general, Turks are usually not as direct as Americans. They generally avoid confrontation. Criticism is often approached in an indirect manner.

Many importers and distributors also like to identify and import unique products that are not currently available on the market. Non-responsive agents who have been assigned to the region by large food manufacturers have frustrated a number of importers in Turkey.

II.2. Consumer Tastes and Preferences

On one hand, Turkish tastes and preferences are very conservative. Fast-food restaurants, as well as most Turkish restaurants, specialize in traditional dishes, the most common of which is kebabs (of which there are several varieties) served with french fries and bulgur or rice. Outside of Istanbul and Ankara, or the tourist destinations of Izmir, Antalya and Bodrum, it is hard to find any foreign influence in the cuisine. On the other hand, the demographics in Turkey are driving many changes. Turkey has a large and young population with rising income levels (especially in urban areas). Increased foreign travel by Turks and by tourists to Turkey is also stimulating significant changes in the attitudes and consumption patterns. Moreover, rapid urbanization and the growing numbers of two-income families are increasing the demand for processed foods.

Consumer expectations have also changed significantly. Faced with an increasingly diverse range of products, quality and price, consumers have become more demanding. In response to changing consumer expectations, large food retailers, especially international companies, are demanding higher quality standards from Turkish food manufacturers, which has led to new investments and improvements within the processing sector. Consumers in larger cities are more aware of international trends, have higher disposable incomes, and have automobiles to reach large warehouse-sized stores. Middle and upper-middle income shoppers are drawn to larger stores, especially if they provide imported and specialty items.

The rapid change in consumption patterns has led Turkish food processors to invest in ready-to-eat meals and frozen food products as well. There are about twenty companies that are in the frozen food and ready-to-eat meal market today with many diverse products. One of the biggest canned tomato paste manufacturers is planning to invest in the production of ready-to-eat meals.

II.3. Food Standards & Regulations

On May 27, 2004, Turkey published a new law entitled the Law on the Production, Consumption and Inspection of Food. This is a framework law for the harmonization of Turkish food regulations with relevant EU regulations. As this is a framework law, regulations pertaining to its implementation will be forthcoming in the near future.

In addition to the May 27 Food Law, the Turkish food industry and food imports are primarily regulated by three related laws and regulations: the June 24, 1995 Turkish Food Law; the November 16, 1997 Turkish Food Codex and the June 8, 1998 Food Regulation. In recent years, according to the National Program for Harmonization, the GOT has been updating significant portions of the Codex to comply with EU regulations by publishing changes in the Official Gazette. The current Turkish Food Codex is available at www.kkgm.gov.tr Advance notifications of such changes are not normally provided to foreign governments.

The May 27, 2004 Law on the Production, Consumption and Inspection of Food provides a new framework for developing and implementing changes to specific standards such as the Turkish Food Codex. The objective is the complete harmonization with EU regulations, and ultimately all of these regulations will be reviewed by the EU Commission itself. This law calls for the creation of a yet-to-be established National Food Codex Commission whose responsibility will be to prepare, review and approve all changes to the Turkish Codex, including those changes that take place through EU harmonization. The Commission consists of two members from the Agriculture Ministry, one from Ministry of Health, two scientists with expertise on food (one assigned by Min. Ag and one from Min. Health), on member from the Turkish Standards Institute, and one member from a non-governmental organization.

The establishment of the National Food Codex Commission is expected to be delayed several months. The current interpretation of the new food law is that all pending changes to the Turkish Food Codex will be postponed until the commission is formed. The 1998 Food Regulation which pertains heavily to import/export and domestic inspection will be completely changed to harmonize with EU regulations. The new food law also introduces new concepts to Turkish food law, such as “Precautionary Measures” and “Traceability”.

The Ministry of Agriculture and Rural Affairs (MARA), General Directorate of Protection and Control (GDPC), has primary responsibility for production, import, and food safety issues regarding food, beverages, packaging material, veterinary products, feed and pesticide products. The General Directorate of Protection and Control has also recently obtained control over regulating the broad range of nutritional and dietary supplements.

All packaged products are required to have a license (registration) number issued by the Directorate after reviewing the results of laboratory tests on the product. The license number is valid for ten years and generally takes about two weeks to obtain. In addition to a laboratory analysis at the time of registration, the law requires products be inspected at the point of entry, wholesale and retail levels. The import process for each product culminates in the issuance (or not) of an import permit, or license. In Turkish this is called a "Kontrol Belgesi", or control document. For processed products, these licenses are required on each shipment and expire, in some cases, after six months. While these are intended to be health control documents, these import permits are often denied or delayed for technical and political reasons (as in the case of wheat, rice and corn).

While many U.S. foods are imported into Turkey without problems, some U.S. companies have had problems complying with Turkish requirements for certifications which are not normally issued in the United States. Requirements and standards for some imported foods may be stricter than those currently applied to domestically produced products. The General Directorate of Protection and Control has a somewhat conservative approach to regulating imports of food and agricultural products. Strict and often-changing technical requirements for processed foods are intended to protect consumers and ‘strategic’ or ‘national’ products. For bulk agricultural commodities, seasonal import bans are enforced through the system of import licensing (and high tariffs) to protect domestic producers.

For a more detailed description of Turkey's food regulatory system, please refer to FAS Food and Agricultural Import Regulations Report TU4025 available on the FAS website www.fas.usda.gov.

II.4. Import Process

In order to import any food product to Turkey, an importer must first submit a written application to the Turkish Ministry of Agriculture (MARA), General Directorate of Protection and Control. Attached to the application letter must be the following documents:
1. A completed import permit form obtained from MARA/Protection and Control;
2. A Proforma Invoice;
3. An Analysis Report providing physical, chemical, microbiological and heavy metal specifications of the product imported. Frozen seafood is exempt from this requirement. A dioxin-free certificate is also required from all countries.
4. For consumer-ready products, a sanitary or phytosanitary certificate from a government food inspection agency of the country of origin stating that the product meets the phytosanitary requirements of the importing country, is fit for human consumption and is freely marketed in the country of origin;
5. A sample of the Turkish label for the product.
6. For alcohol products, a "distribution certificate" provided by the producer's company to the importer and/or distributor indicating that the Turkish company is authorized to market and deliver the product in Turkey;
7. For "special" foods such as diet foods, foods for diabetics, vitamins, baby foods, etc. the importer must provide a written declaration that he will not advertise the foodstuff in such a way as to mislead the consumer.

The importer will normally receive written approval along with an import permit from the Ministry of Agriculture within one or two weeks.

II.5. Customs Process

Importers need to present an approved import license, bill of lading, certificate of origin, sanitary or phyto-sanitary certificate, the analysis report (physical, chemical, etc.) and other standard import documents to Customs upon entry of the product. The Ministry of Agriculture officials take samples for testing to confirm the analysis report with results generally available in two to three days. Bulk or semi-processed commodities are subject to further checks for compliance with either the plant quarantine law or the animal health law.

Section III: Market Sector Structure and Trends

III.1. Retail Food Sector

Although the number of large retail outlets in Turkey is growing, the majority of consumers do not shop in these stores due to low incomes and high prices. Industry sources estimate that only five to seven million people do the majority of their shopping in modern retail outlets. Food prices in Turkey, especially for imported processed goods, are extremely high. For example, beef prices are higher in Turkey than they are in Switzerland. High tariff protection applies to processed food products with tariffs ranging up to 227.5 percent. The average per capita income in Turkey is about US$ 3,300 per year (2003), which significantly limits the purchasing power of the majority of Turks.

The structure of the retail sector is significantly influenced by the type of food consumed by the majority of the population. For low-income groups, it is estimated that 55 percent of the diet is made up of bread with additional 15 percent made up of rice, potatoes and pasta products. For the entire population, processed foods make up only about 15 to 20 percent of consumption. Thus, the share of hypermarkets in the overall food retail market is still low but increasing gradually. Industry sources estimate that hypermarkets controlled approximately 9.5 percent of the retail market in 2002, up from 6.5 percent in 1999. This share is expected to reach 12 percent by the end of 2004. For a more detailed description of Turkey's retail food market, please refer to FAS Ankara Report TU4005 available on the FAS website www.fas.usda.gov.

III.2. Food Processing Sector

Turkey, with its rich agricultural base, has a highly developed food-processing industry. According to the 1998 census there are over 24,000 food-processing firms in Turkey. Most are small to medium sized enterprises. About 4,000 of these firms use modern technology for production and quality control.

In 2003 processed food expenditures were estimated at $23 billion up from $18.7 billion in 2000 due to improved economic conditions following a financial crisis and recession in 2000 and 2001. As result of improved economical conditions, all the major local holding companies are investing in the food processing sector. A rapid growth is foreseen in production of various food items like dairy products namely milk, yogurt, cheese and ice cream and also, biscuits and fruit juices. Despite the increases in last two years annual expenditures on processed food items still only amounts to about USD 325 per person.

Large food processors prefer to purchase locally or import their food supplies directly most of the time. However, small to medium sized processors get in contact with importers, brokers, and/or wholesalers. Often times, an importer also acts as a wholesaler.

For a more detailed description of Turkey's food processing sector, please refer to FAS Ankara Report TU2047 available on the FAS website www.fas.usda.gov.

III.3. HRI Food Service

The changing demographics in Turkey continue to bring rapid development of two niche sectors – fast-food and institutional food service.

There are about 50,000 restaurants in Turkey. Restaurants comprise the leading market segment in the food service sector, accounting in 2001 for 44% of total food service sales - 85% in food and 15% in beverages. It is a large category covering all outlets from traditional kebab & pide (similar to pizza) houses to luxurious restaurants offering a wide variety of international dishes.

Luxury restaurants comprise the main market for imported food & beverages, but only 5-10% of the total restaurant market. Traditional restaurants, which are open for lunch as well as dinner and often serve wine, beer and alcohol, are estimated to have over fifty percent of total restaurant sales. Their use of imported food & beverages is negligible, as high prices (as a result of high tariffs) are a major deterrent to most independent restauranteurs. Fast-food restaurants comprise the remainder of the restaurant sector, and can be divided into two main sub sectors - modern and traditional. Traditional fast food comprises of small take-out restaurants specializing in kebabs and other local dishes that are sold at low prices for stand-up or take away customers. The modern fast-food sector is comprised of McDonalds and other international and local chains serving salads, sandwiches, hamburgers, chicken and pizza. This sub sector is located predominantly in larger urban areas. An average 10% growth rate is expected in restaurant food service for the next five years.

Foreign restaurants procure their imported items either through importers or wholesalers. A few international chains, like TGI Fridays, import directly. The main import items are wine, beer, fish products, specialty cheeses, sauces and pastry, and staple items like corn, rice, etc. when domestic supplies are not appropriate.

Fast food chains are a relatively new concept in Turkey having begun only 16 years ago. Turkey's fast food market showed a remarkable recovery in terms of total sales following the 2001 crisis and is expected to reach USD 1.2 billion at the end of 2004 compared to USD 600 million in 2001. The sector is expected to continue to grow about fifteen percent in 2005. Some new chains are getting ready to operate in Turkey but currently there are 22 fast food chains with a total of 650 outlets. The great majority (about 75%) of them are located in big cities.

In the 1980s, institutional food services began emerging in Turkey to supply food to cafeterias in factories, schools, hospitals, private companies, and public sector organizations. The institutional food service sector developed rapidly in recent years particularly after the Turkish army started out-sourcing its meal needs. The total size of the sector for 2004 is estimated about USD 5 billion compared to USD 3 billion in 2003. There are about 3,000 food service enterprises in Istanbul alone and the total for Turkey is estimated to be more than 5,000.

The hotel sector has estimated to have 20% market share of total food service sales. The hotel sector grew about 20 percent per year parallel to the growth in the tourism industry between 2001-2004. Tourism sector income is expected to reach USD 15 at the end of 2004 compared to USD 10 billion in 2001.

For more information on this sector, please refer to FAS Ankara report TU2012 available at the FAS website www.fas.usda.gov.

Section IV: Best High-Value Product Prospects

The best high-valued products for the imported food market (retail) are internationally recognized branded food products. These types of products in general accounted for 30 percent of overall imported food products. These include cocoa and instant coffee, chocolate and confectionary goods, cookies and crackers, breakfast cereal, cheese, alcoholic beverages, sauces and pet foods. The change in wine and beer import and distribution regulations now allows imported products to be sold in the retail market which created new opportunities for US wine and beer to sold in the Turkish market.

Section V: Key Contacts and Further Information

Organization	Contact Name	Address	Phone	Fax
The Union of Chambers of Commerce, Industry, Maritime Trade And Commodity Exchanges of Turkey/ *Turkiye Odalar ve Borsalar Birligi (TOBB)*	Mr. Rifat Hisarciklioglu Chairman	Ataturk Bulvari 149 Bakanliklar Ankara, Turkey	90-312-413 8000 90-312-413-8022 (direct)	90-312-418-3268
Ankara Chamber of Commerce / *Ankara*	Mr. Sinan Aygun	Eskisehir Yolu Uzeri, II. Cadde No.5	90-312-285-7950	90-312-

Organization	Contact Name	Address	Phone	Fax
Ticaret Odasi	Aygun	06530 Sogutozu Ankara, Turkey	90-312- 285-7954	286-2764
Ankara Chamber of Industry/ *Ankara Sanayi Odasi*	Mr. Zafer Caglayan	Ataturk Bulvari 193/4 06680 Kavaklidere Ankara, Turkey	90-312- 417-1200 90-312- 417-1204	90-312- 417-2060 90-312- 417-5205
Chamber of Marine Trade/ *Deniz Ticaret Odasi*	Mr. Metin Kalkavan	Meclisi Mebusan Cad., 22 34427 Salipazari Istanbul, Turkey	90-212- 252-0130 pbx	90-212- 293-7935 90-212- 243-5498 (direct)
Istanbul Chamber of Industry / *Istanbul Sanayi Odasi*	Mr. Tanil Kucuk Chairman	Mesrutiyet Cad., 118, 34430 Tepebasi Istanbul, Turkey	90-212- 252-2900 pbx	90-212- 249-3963 90-212- 249-5084
Istanbul Chamber of Commerce / *Istanbul Ticaret Odasi*	Mr. Mehmet Yildirim Chairman	Resadiye Cad., 34112, Eminonu Istanbul, Turkey	90-212- 455-6000	90-212- 513-1565
Aegean Chamber of Industry / *Ege Bolgesi Sanayi Odasi*	Mr. Kemal Colakoglu Assembly President	Cumhuriyet Bulvari 63 35210 Pasaport Izmir, Turkey	90-232- 441-0909	90-232- 483-9937
SET-BIR (Union Of Dairy Producers)	Melek Us, Secretary General	Coban Yildizi Sok. No:1/ 14 Cankaya, Ankara, Turkey	90-312- 428-4774 90-312- 428-4775	90-312- 428-4746
BESD-BIR (Union of Poultry Producers)	Kemal Akman, Chairman	Cetin Emec Blv., 8. Cad. No.4/6, Ovecler, Ankara	90-312- 472-7788	90-312- 472-7789
Turkish Flour Millers Association/ *Turkiye Un Sanayicileri Birligi*	Mr. Ilker Tanik, Secretary General	Selanik Cad. No. 82/30, Kizilay, Ankara	90-312- 417-5357	90-312- 417-5358
Turkish Feed Millers Association/ *Turkiye Yem Sanayicileri Birligi*	Mr. Ulku Karakus, President	Cetin Emec Blv., 2. Cad., No.38/7, Ovecler, Dikmen-Ankara	90-312- 472-8320	90-312- 472-8323
Turkish Seed Industry	Mr. Ayhan Elci,		90-312-	90-312-

Organization	Contact Name	Address	Phone	Fax
Association/ *Turkiye Tohumcular Birligi*	Secretary General	Mithatpasa Cad. 50/4 Fazilet Apt. 06420 Yenisehir, Ankara Turkey	432-0050 90-312-432-2650 (direct)	432-0050
Union of Pasta Producers/ *Makarna Sanayicileri Dernegi*	Mr. Ergin Erzurumlu, Secretary General	Cinnah Cad. No. 59/5, Cankaya, Ankara	90-312-441-5547	90-312-438-3433
Foreign Economic Relations Board / *Dis Ekonomik Iliskiler Kurulu - DEIK*	Mr. Rifat Hisarciklioglu Chairman	Top Plaza Talatpasa Cad., No.3, Gultepe Levent Istanbul, Turkey	90-212-243-4180	90-212-243-4184
Turkish-American Business Association / *Turk-Amerikan Isadamlari Dernegi*	Mr. Zeynel Abidin Erdem Chairman	Buyukdere Cad., Tankaya Apt., No.18, Kat:7, Daire:20, Sisli, 34360 Istanbul,Turkey	90-212-291-0916 90-212-291-0917	90-212-291-0645 90-212-291-0647
Turkish Industrialists and Businessmen Assn./ *Turk Sanayicileri ve Isadamlari Dernegi-TUSIAD*	Mr. Omer Sabanci Chairman	Mesrutiyet Cad., No.74 80050 Tepebasi Istanbul, Turkey	90-212-249-5448 90-212-249-0723 90-212-249-1929	90-212-249-0913 90-212-249-1350
Assn. Of Bursa Industrialists & Businessmen / *Bursa Sanayici ve Isadamlari Dernegi- BUSIAD*	Mr. Ali Ihsan Yesilova	Kultur Park Ici Arkeoloji Muzesi Yani, 16050 Bursa, Turkey	90-224-233-5018	90-224-235-2350
Assn. Of Foreign Capital Coordination / *Yabanci Sermaye Koordinasyon Dernegi-YASED*	Mr. Saban Erdikler Chairman	Barbaros Bulvari Murbasan Sok., Koza Is Merkezi B-Blok, Kat:1 34349 Besiktas Istanbul, Turkey	90-212-272-5094	90-212 274-6664
Independent Industrialists and Businessmen's Assn./ *Mustakil Sanayici ve Isadamlari Dernegi - MUSIAD*	Dr. Onder Bolat Chairman	Mecidiye Cad., No.7/50 Cansizoglu Is Merkezi, 34387, Mecidiyekoy, Sisli Istanbul, Turkey	90-212-213-6100/ 2 lines	90-212-213-7890 90-212-216-0142

Organization	Contact Name	Address	Phone	Fax
The Banks Association of Turkey / *Turkiye Bankalar Birligi*	Mr. Ersin Ozince Chairman	Nispetiye Cad., Akmerkez B3 Blok, Kat:13-14 80630 Etiler Istanbul, Turkey	90-212-282-0973 90-212-282-0988	90-212-282-0946 90-212-282-0947
Turkish Industrial Development Bank / *Turkiye Sinai Kalkinma Bankas A.S.i-TSKB*	Mr. Halil Eroglu Chairman	Meclisi Mebusan Cad., 161 34427 Findikli Istanbul, Turkey	90-212-334-5050	90-212-334-5088 and 243-2975
Union of Turkish Agricultural Chambers / *Turkiye Ziraat Odalari Birligi*	Mr. Semsi Bayraktar Chairman	GMK Bulvari No:25 Demirtepe Ankara, Turkey	90-312-231-6300	90-312-231-7627
Chamber of Agricultural Engineers / *Ziraat Muhendisleri Odasi*	Mr. Gokhan Gunaydin President	Karanfil Sok., 28/12 Kizilay Ankara, Turkey	90-312-418-5597 90-312-425-0555	90-312-418-5198
Chamber of Forest Engineers / *Orman Muhendisleri Odasi*	Mr.Ali Kucukaydin Chairman	Necatibey Cad., 16/13, Sihhiye Ankara, Turkey	90-312-229-2009	90-312-229-8633
Market and Public Opinion Researchers Assn. / *Pazarlama ve Kamuoyu Arastirmacilari Dernegi*	Mr. Ali Danis Chairman Ms.Jale Elhadef Coordinator	Istiklal Cad., Imam Adnan Sok., Peva Han, Kat:3, 34435 Beyoglu Istanbul, Turkey	90-212-249-2319	90-212-249-9956
Advertising Firms Association / Reklamcilar Dernegi	Mr. Jeffi Medina President	Istiklal Cad., No.407, Kat;4, Beyoglu Istanbul, Turkey	90-212-243-9363	90-212-243-9370
Advertisers Association / *Reklam Verenler Dernegi*	Ms. Dilek Erkey President	Ali Nihat Tarlan cad., Karaman Sok., Hofman Is Plaza, No:2/15, Kat:7 34744 Bostanci Istanbul, Turkey	90-216-361-4452	90-216-361-4429
Food Importers Association / *Tum Gida Ithalatcilari Dernegi-TUGIDER*	Ms. Melahat Ozkan Secretary General	Buyukdere Cad. No:65/13 Soner Apt. Kat:5 Mecidiyekoy, Istanbul Turkey	90-212-274-3265	90-212-347-2570

Organization	Contact Name	Address	Phone	Fax
Beverage Producers Association / *Mesrubatcilar Dernegi*	Mr. Ismail Sayit President	Bedri Rahmi Eyuboglu Sok., Derya Apt., No.3, Kat:6, 34726, Kalamis Istanbul, Turkey	90-216-345-9915 90-216-348-3616	90-216-348-1029
Turkish Franchising Association / *Ulusal Franchising Dernegi-UFRAD*	Mr. Mahir Saranga	Ergenekon Cad., Pangalti Is Merkezi, 89/15 Kat: 3, 80240 Pangalti, Istanbul, Turkey	90-212-296-6628	90-212-219-0564
Paper and Paper Pulp Industrialists Foundation / *Seluloz ve Kagit Sanayicileri Vakfi*	Mr. Erdal Sukan President	Buyukdere Cad., Cinar Apt., No95, Kat:3, D:11-12 Mecidiyekoy Istanbul, Turkey	90-212-275-1389	90-212-217-8888
Textile Research / *Tekstil Arastirma Dergisi*	Mr. Celal Yuksel President	Millet Cad., Sule Apt. No.35, Kat:3 34300 Findikzade, Istanbul, Turkey	90-212-588-4524 90-212-589-0179	90-212-632-7129
Turkish Clothing Manufacturers Assn. / *Turkiye Giyim Sanayicileri Dernegi*	Mr. Umut Oran Chairman	Haydar Akin Is Merkezi 2, Mehmet Akif Cad., 1. Sok., No.23, Kat:5 Sirinevler Istanbul, Turkey	90-212-639-7656	90-212-451-6113
International Overland Transporters Assn. / *Uluslararasi Nakliyeciler Birligi*	Mr. Cetin Nuhoglu Chairman	Nispetiye Cad., Seheryildizi Sok., No.10, Etiler Istanbul, Turkey	90-212-359-2600	90-212-359-2626

Important Regulatory and Governmental Contacts

Ministry of Agriculture and Rural Affairs/ *Tarim ve Koyisleri Bakanligi*	Prof. Dr. Sami Guclu, Minister	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 419-8300	(90-312) 417-7168 (90-312) 425-2868
Ministry of Agriculture and Rural Affairs/ *Tarim ve Koyisleri Bakanligi*	Mehmet Cagil, Under Secretary	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 425-2107 (90-312) 418-2486	(90-312) 417-9247
General Directorate of Protection and Control/ *Koruma ve Kontrol Genel Mudurlugu*	Dr. Nihat Pakdil, Director General	Akay Cad. No. 3, Bakanliklar, Ankara	(90-312) 425-7789 (90-312) 425-5196	(90-312) 418-6318
General Directorate of Production and Development/ *Uretim ve Gelistirme Genel Mudurlugu*	Huseyin Velioglu, Director General	Milli Mudafa Cad. No.20, Kizilay, Ankara	(90-312) 418-2059 425-1211	(90-312) 425-2016
Turkish Grain Board/ *Toprak Mahsulleri Ofisi*	Nebi Celik, Director General	Milli Mudafa Cad. No.18, Kizilay, Ankara	(90-312) 418-2316/ 17	(90-312) 417-4702
Ministry of Industry/ Sanayi Bakanligi	Ali Coskun, Minister	Eskisehir Yolu 7.Km., No. 154, Ankara	(90-312) 286-0696 286-2006	(90-312) 286-5325
Undersecretariate of Foreign Trade/ *Dis Ticaret Mustesarligi*	Tuncer Kayalar, Under Secretary	Eskisehir Yolu, Emek, Ankara	(90-312) 212-8742	(90-312) 212-8255
Undersecretariate of Treasury/ *Hazine Mustesarligi*	Ibrahim Halil Canakci, Under Secretary	Eskisehir Yolu, Emek, Ankara	(90-312) 212-5745 212-8630	(90-312) 212-2297
Ministry of Environment & Forestry/ Cevre ve *Orman Bakanligi*	Osman Pepe, Minister	Ataturk Bulvari, Bakanliklar, Ankara	(90-312) 425-4606 425-2818	(90-312) 418-7354
Ministry of Health/ *Saglik*	Recep Akdag, Minister	Sihhiye, Ankara	(90-312) 430-6095 - 98	(90-312) 431-4879

Bakanligi				
Ministry of Finance/ *Maliye Bakanligi*	Kemal Unakitan, Minister	Ilkadim Cad. No. 2, Bakanliklar, Ankara	(90-312) 425-0080 425-0023	(90-312) 425-0058

Appendix I. Statistics

Table A. Key Trade and Demographic Information

Agricultural Imports From All Countries USD U.S. Market Share (%): All data 2002 UN figures	$3.4 Billion (25 percent)
Consumer Food Imports From All Countries USD U.S. Market Share (%) All data 2002 UN figures	$416 million (4 percent)
Edible Fishery Imports From All Countries ($mln) U.S. Market Share (%) All data 2002 UN figures	$19 million (2 percent)
Total Population / Annual Growth Rate (%)	70.9 Million / (1.58%)
Urban Population / Annual Growth Rate (%)	44.09 Million / (2.68%)
Number of Major Metropolitan Areas	7
Size of the Middle Class / Growth Rate (%)	14 Million / (approx 1%)
Per Capita GNP 2003 (U.S. Dollars)	$3,380
Unemployment Rate (%)	10.5
Per Capita Food Expenditures (USD)	Approximately $1,200
Percent of Female Population Employed	27.2%
Current Exchange Rate (US$1 = Turkish Lira)	TL 1,495,307

Table B. Consumer Food and Edible Fishery Products

Note: Currently Trade Statistics from the World are not available. This report will be updated once they become available.

Turkey Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
(In thousands of Dollars)	2001	2002	2003	2001	2002	2003	2001	2002	2003
CONSUMER-ORIENTED AGRICULTURAL TOTAL									
Snack Foods (Excl. Nuts)				686	1,198	693			
Breakfast Cereals & Pancake Mix				27	4	42			
Poultry Meat				9,415	17,147	39,940			
Dairy Products (Excl. Cheese)				620	320	340			
Cheese									
Eggs & Products				582	406	2,046			
Fresh Fruit				0	0	0			
Processed Fruit & Vegetables				678	718	2,931			
Fruit & Vegetable Juices				0	0	0			
Tree Nuts				1,634	3,425	9,492			
Wine & Beer				0	0	0			
Nursery Products & Cut Flowers				6	3	113			
Pet Foods (Dog & Cat Food)				2,390	2,402	2,846			
Other Consumer-Oriented Products				2,115	2,408	5,005			
FISH & SEAFOOD PRODUCTS									
Other Fishery Products									

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office
Note: U.S. Trade Data totals are higher due to transshipments of poultry meat through the Mersin Free Zone.

Table C.1 CONSUMER-ORIENTED AGRICULTURAL TOTAL

Turkey Imports- Top 15 Ranking	**2000**	**2001**	**2002**
	1000$	**1000$**	**1000$**
Germany	64,582	55,346	69,755
Netherlands	53,271	37,805	48,670
Ireland	5,905	21,514	45,596
Italy	23,184	17,787	24,604
France	42,334	19,294	24,111
Ecuador	36,678	13,894	22,406
United States	15,408	13,696	16,941
Spain	15,432	14,232	15,862
Denmark	15,712	12,461	15,534
Cyprus	37	1,156	11,923
United Kingdom	18,590	13,279	11,482
Switzerland	12,976	10,715	10,386
Belgium	10,480	8,306	10,234
Poland	3,442	6,675	8,223
Austria	7,342	8,201	5,631
Other	85,070	49,618	74,908
World	410,449	303,993	416,270

Source: United Nations Statistics Division

Table C.2 Turkey Top 10 Ranking of Fish & Seafood Product Exporters

	2000	2001	2002
	1000$	1000$	1000$
Norway	12,449	6,972	8,636
Spain	15,037	1,502	3,445
Seychelles	158	537	1,449
France	3,585	814	1,275
Ireland	0	5	835
Mauritania	0	19	719
Germany	53	19	423
India	636	204	383
Singapore	371	224	349
United States	108	3	307
Other	5,477	1,526	1,417
World	37,874	11,831	19,235

Source: United Nations Statistics Division